

## Creating Templates and Submitting a Template Claim

The ProviderOne system allows a provider to create and save Direct Data Entry (DDE) claim templates. Templates are pre-designed claims that can be customized for a particular service or item supplied monthly to a client, to bill a special service code, or to create template batches for Nursing Home clients. Templates can be used for claim entry with standard information already completed, or be used over and over so that each claim does not have to be created from scratch. There is no limit to the number of templates that can be created. You can submit single claims or batches of claims from saved claim templates. (For more information on using templates for Nursing Home claims, view the [Nursing home provider](#) webinar.)

### Create a Template

- Log into ProviderOne using the Claims Submitter or Super User profile and choose **"Manage Templates."**
- At the Create Claim Template screen, pick the template type and click the **"Add"** button. If there are no templates created for your domain, you will see "No Records Found" in red.

Provider Portal:

Online Services:

Claims Hide/Max

- Claim Inquiry
- Claim Adjustment/Void
- On-line Claims Entry
- On-line Batch Claims Submission (B2B)
- Resubmit Denied/Voided Claims
- Retrieve Saved Claims
- Manage Templates**
- Create Claims from Saved Templates
- Manage Batch Claim Submission

Close Add

Create a Claim Template

Type Of Claim: Institutional \*

Claims Template List

Edit View Delete SaveAs/Copy Create Batch Create Batch All Auto Batch

Filter By: [ ] And [ ] [ ] Go

	Template Name	Type	Last Updated By
No Records Found !			

- ProviderOne loads the DDE screen of the template type selected. Choose a **Template Name** and answer **all questions marked with a question mark and a red asterisk**. This is the minimum data required to save a template.

Close Save Template Reset

**Professional Claim:**

Note: asterisks (\*) denote required fields.

Basic Claim Info Other Claim Info

Billing Provider | Rendering Provider | Subscriber | Claim | Service

\* Template Name: [ ]



- Providers can add as much or as little information necessary, as long as the template name and all required questions are answered. Once the template is complete, click on the “**Save Template**” button.

Close **Save Template** Reset

**Institutional Claim:**

Note: asterisks (\*) denote required fields.

Basic Claim Info Other Claim Info

- A pop-up window will appear with a question:

Windows Internet Explorer

Do you want to save the Template?

**OK** Cancel

- After clicking the OK button, ProviderOne returns to the Claim Template screen adding the template to the list.

Create a Claim Template

Type of Claim: Institutional

Claims Template List

Filter By: Template Type Institutional And Go

	Template Name	Type	Last Updated By	Last Updated Date
<input checked="" type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010

Viewing Page 1 Page Count Save To XLS

Add as many templates as needed

- Create new ones using the above method or
- Copy a saved template then edit it

## Copy a Template

- To copy a template, click on the  box next to the template name to copy.

Create a Claim Template

Type of Claim: Institutional

Claims Template List

Filter By: Template Type Institutional And Go

	Template Name	Type	Last Updated By	Last Updated Date
<input checked="" type="checkbox"/>	John Smith	Institutional	GaryM	10/2/2010

Viewing Page 1 Page Count Save To XLS

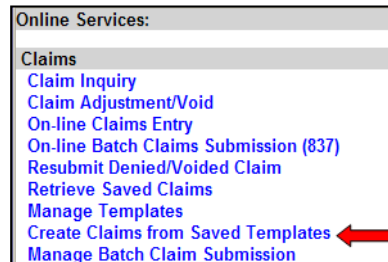
- Then click on the **Save As/Copy** button

- The system now displays the DDE screen with the template information except the template name. Name this template and change any data as needed then save the template. Build as many templates as required using this method.

Use the Edit feature to make changes to any template. Delete templates no longer needed to keep the template list manageable.

## Submit a Claim using a Template

Log into ProviderOne using the Claims Submitter or Super User profile and at the provider portal click on **“Create Claims from Saved Templates.”**



Close

Create Claim from Saved Templates List:

Filter By: [ ] And [ ] Go

Template Name ▲ ▼	Type ▲ ▼	Last Updated By ▲ ▼	Last Updated ▲ ▼
John Smith	Institutional	GaryM	10/2/2010
Jane Doe	Institutional	GaryM	10/2/2010
Uncle Sam	Institutional	GaryM	10/2/2010
Susan Madigan	Institutional	GaryM	10/2/2010
Lisa Fax	Institutional	GaryM	10/2/2010
Robert Thomas	Institutional	GaryM	10/2/2010
Mickey Dee	Institutional	GaryM	10/2/2010

<< Prev Viewing Page 1 Next >> Go Page Count SaveToXLS

Click on the template name to create a claim.

ProviderOne loads the template data in the DDE claim screen.

Close Save Claim Submit Claim Reset

**Claim:**

Note: asterisks (\*) denote required fields.

Basic Claim Info Other Claim Info

Billing Provider | Subscriber | Claim | Service

**PROVIDER INFORMATION**

Go to Other Claim Info to enter information for providers other than the Billing Providers.

**BILLING PROVIDER**

\* Provider NPI: 1831199966 \* Taxonomy Code: 193200000X

**SUBSCRIBER/CLIENT INFORMATION**

**SUBSCRIBER/CLIENT**

\* Client ID: [ ]

☐ Additional Subscriber/Client Information

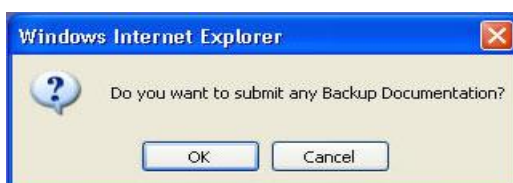
\* Org/Last Name: SMITH First Name: JOHN

Finish filling in all the claim data.

- Once completed the claim can be saved or
- Submit the claim to ProviderOne

To submit the claim:

- Click on the Submit Claim button
- ProviderOne should then display the BU prompt



- Click OK to submit back up or
- Click cancel for no BU (we are not sending BU)

The next Claim Detail screen shows the claim data.

Submitted Institutional Claim Details

TCN: 20092550000001000  
Provider NPI: 5522336671  
Client ID:   
Date of Service: 9/9/2009 0:0:0-9/11/2009 0:0:0  
Total Claim Charge: 2514.69

Please click "Add Attachment" button, to attach the documents. Add Attachment

Attachment List:

Live No	File Name	Attachment Type	Transmission Code	Attachment Control	File Size	Delete	Uploaded On
No Records Found!							

Print Print Cover Page Ok

**WARNING: You must click the OK button to complete the claims submission.**

It is required to click the **OK** button to send the claim!!

## References

See the [ProviderOne Resources](#) page for more training materials.

## Questions

What are templates?

Templates are pre-designed electronic claims that a provider can customize by entering standard information for a particular service, client, or group of clients. The template can then be used as a starting point for claim entry with the standard information already filled in. There is no limit to the number of templates providers can create.

Why would I use templates?

If you regularly bill similar services for similar clients, it may benefit you to use templates so that some of the standard information you would have to enter on every claim is prefilled in for you.

How do I access the template/submit batch features?

In the provider portal, the features are accessed through these menus:

- **Manage Templates** – Use this option to create, edit, and manage templates.
- **Create Claims from Saved Templates** – Use this option to start a new claim from a saved template.
- **Manage Batch Claim Submission** – Use this option to submit a batch of claims created from saved templates. Using a combination of date ranges and checkboxes, the saved templates selected by a provider will be batched together and submitted as claims for processing in ProviderOne.
- **Institutional batch claims process** - Makes it easier to submit batches of Institutional claim types, based on admit and discharge dates. This feature is designed especially for Nursing Homes but may be useful for other institutional providers. **NOTE** – This enhancement will only be available for Institutional claims. It will not be possible to use admit/discharge dates on Professional and Dental claims

- Who can use templates? Any provider billing through the direct entry screens in ProviderOne can use the template features.
- What if I have questions? Providers with questions about templates should review the [ProviderOne Billing and Resource Guide](#) for more detail.